APPLIED | NET® 2021
THE DIGITAL ECOSYSTEM OF INSURANCE

APPLIED
CLIENT NETWORK

Events, Activities, Tasks and Further Actions in Applied Epic Part 2

SESSION HANDOUT

Prepared for Applied Client Network and Applied Systems

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Target Audience:

	Accounting		Marketing
	Administration	X	Operations
	Claims		Sales
X	Customer Service		Underwriting
	Human Resources		ALL
X	IT		Other: (describe)
	Legal		

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Seminar Type:

Servicing and Workflows

Seminar Level:

Basic: An introductory level course is basic in nature and addresses fundamental concepts. We expect attendees to have a basic level of insurance knowledge, have been oriented to an agency or brokerages' processes. For functional courses, it is *not* necessary for the attendee or participant to have previous knowledge of the agency or brokerage management system or software program.

Class Description:

Learn how to use Applied Epic more effectively by configuring Events, Activities, Tasks and Further Actions to build your workflows. In Part 2 of this two part series, we will dive into the details on activity configuration to take your workflows further. By learning the functionality of Tasks and Further Actions, we will discuss how to automate workflows, how to ensure consistency and accuracy for your staff.

Learning Outcomes:

- Learn the functionality of Tasks and Further Actions
- Ensure workflow completion and accuracy utilizing Tasks
- Identify ways activity configuration can automate workflows and provide ways to communicate seamlessly with your client by using Further Actions

Assumptions: This seminar is based on the following
Applied Epic 2021

Tasks and Further Actions

Configuration Basics

Further Actions

- An Activity can be configured to automatically do something in the future, for instance:
  - Close Activity
  - Generate an Activity
  - Leave Activity Open
  - Send a 2nd Request
  - Send a Letter
  - Send an SMS Text

- When / how triggered

- 2nd and 3rd Further Actions - **Enabled only if *Send a 2nd Request*, *Send a Letter* or *Send an SMS Text* is chosen in Further Actions**
  - Offers the following options on 2nd Further Action:
    - Close Activity
    - Generate an Activity
    - Leave Activity Open
    - Send a 3rd request
    - Send a Letter
    - Send an SMS Text

  - When/How triggered, what to do with original activity

  - If a 2nd Further Action of ***Send a 3rd request, Send a Letter or Send an SMS Text*** were chosen, then the following options are available on 3rd Further Action:
      - Close Activity
      - Leave Activity Open

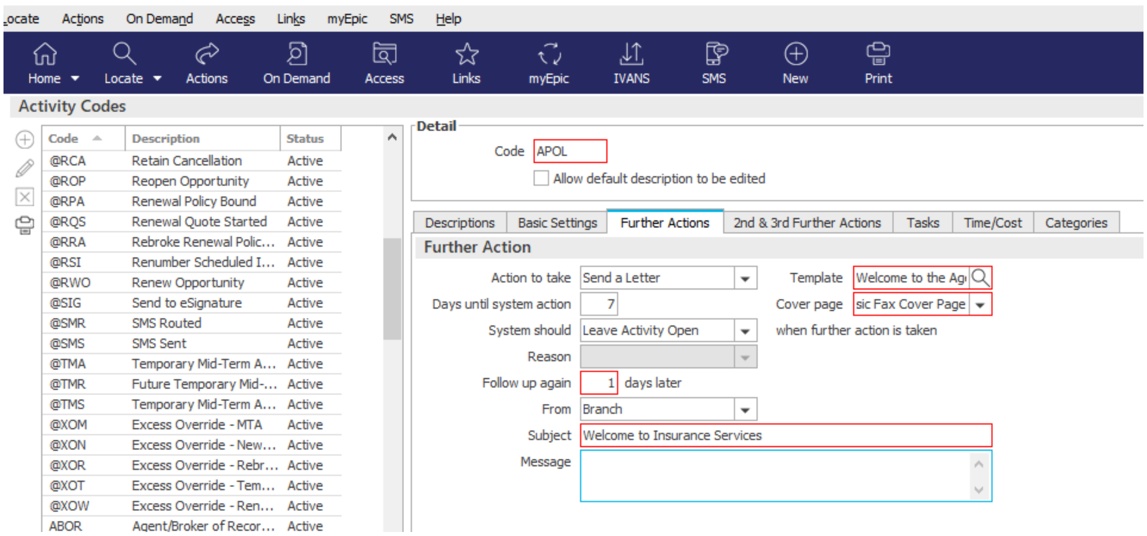
Tasks

- Series of steps that need to occur in order to complete the Activity
- Tasks can serve as a checklist of things to do, reminders for the owner to do certain agency required tasks
- Who/Owner can be different for the activity follow-up and for tasks
- Start & Due dates can be different for tasks than for the activity follow-up

Configuration Detail

Activity Codes - Further Actions

- Close Activity
- Generate an Activity
- Leave Activity Open
- Send a 2nd Request
- Send a Letter
- Send an SMS Text



Note on Further Actions: Choosing *Send a 2nd Request* applies only to activities associated to certain Events that involve Distribution from Epic. The Further Action of sending a 2nd or 3rd request will re-send that initial item sent via Distribution.

Those Events utilizing Epic Distribution are:

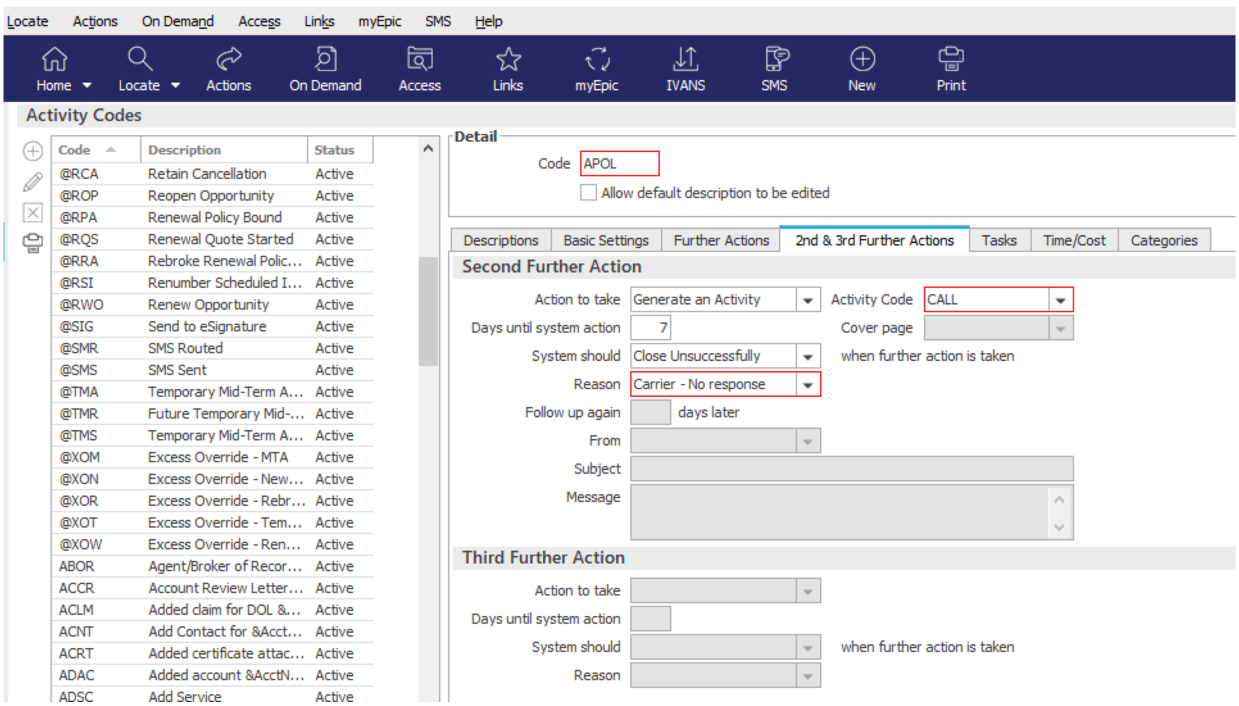
- Agent/Broker of Record Change
- Close Binder Transaction
- Fax Sent Successfully
- Print Cancellation
- Print Lost Policy Receipt
- Review Application
- Review Change Request
- Submit Application
- Submit Cancellation
- Submit Change Request
- Submit to Carriers

Activity Codes – 2nd & 3rd Further Actions

- Offers the following options on 2nd Further Action:
  - Close Activity
  - Generate an Activity
  - Leave Activity Open
  - Send a 3rd request
  - Send a Letter
  - Send an SMS Text

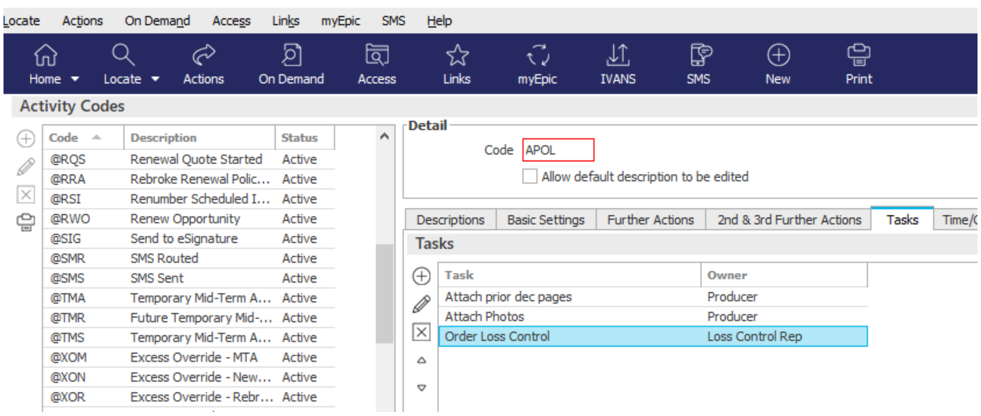
- When/How triggered, what to do with original activity

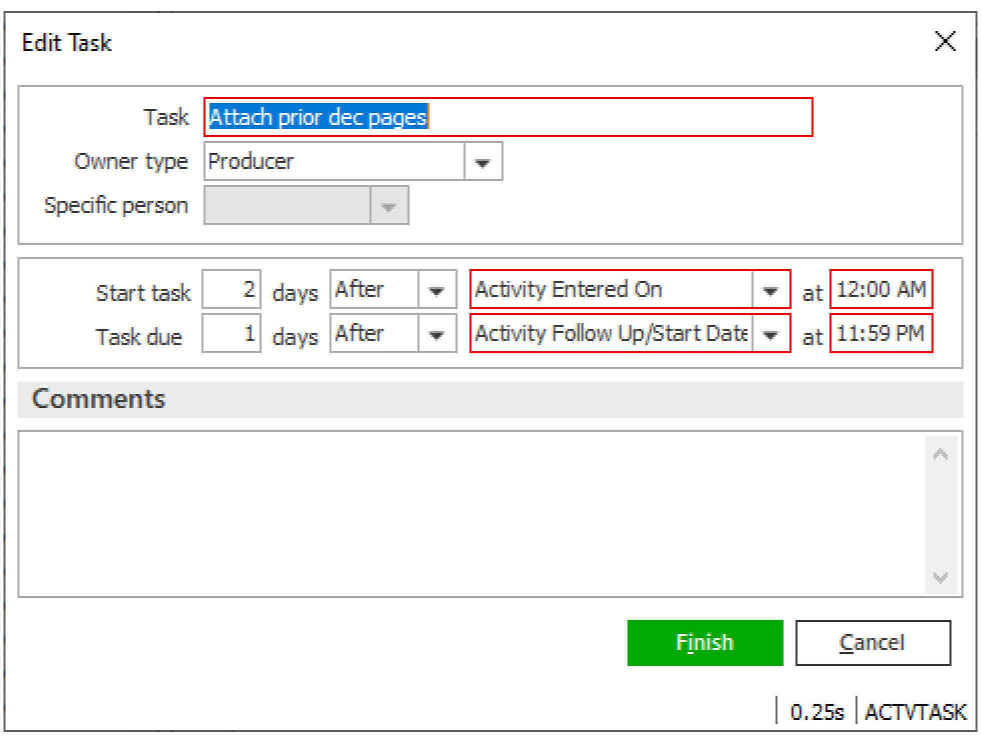
- If a 2nd Further Action of Send a 3rd request, Send a Letter or Send an SMS Text were chosen, then the following options are available on 3rd Further Action:
  - Close Activity
  - Leave Activity Open



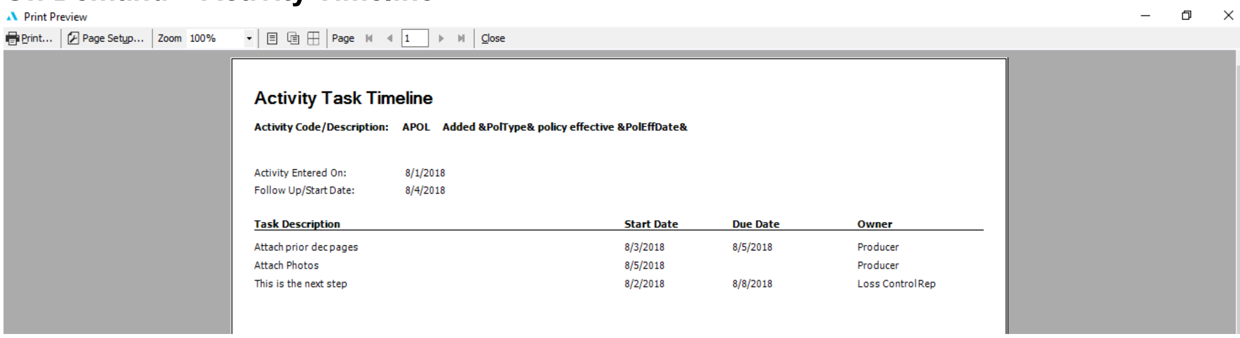
Activity Codes – Tasks

- Tasks – things to do associated with this Activity, can be entered here and will apply every time this activity is used or can be added by the user once the activity is added
- Previously Defined Tasks are added to the activity code in Configure and will appear on the activity each time the activity is added.
- Optionally, users can add Tasks to existing activities as they are added on an account. This creates work for the users and can lead to inconsistent workflows; before user defined tasks are used, consider whether they should be a part of that activity code every time it's added.
- Working with Tasks at Homebase
- Closing Activity / Task
- On Demand – Activity Timeline provides an overview of the tasks





On Demand > Activity Timeline



Activity Task Timeline

Activity Code/Description: APOL Added &PolType& policy effective &PolEffDate&

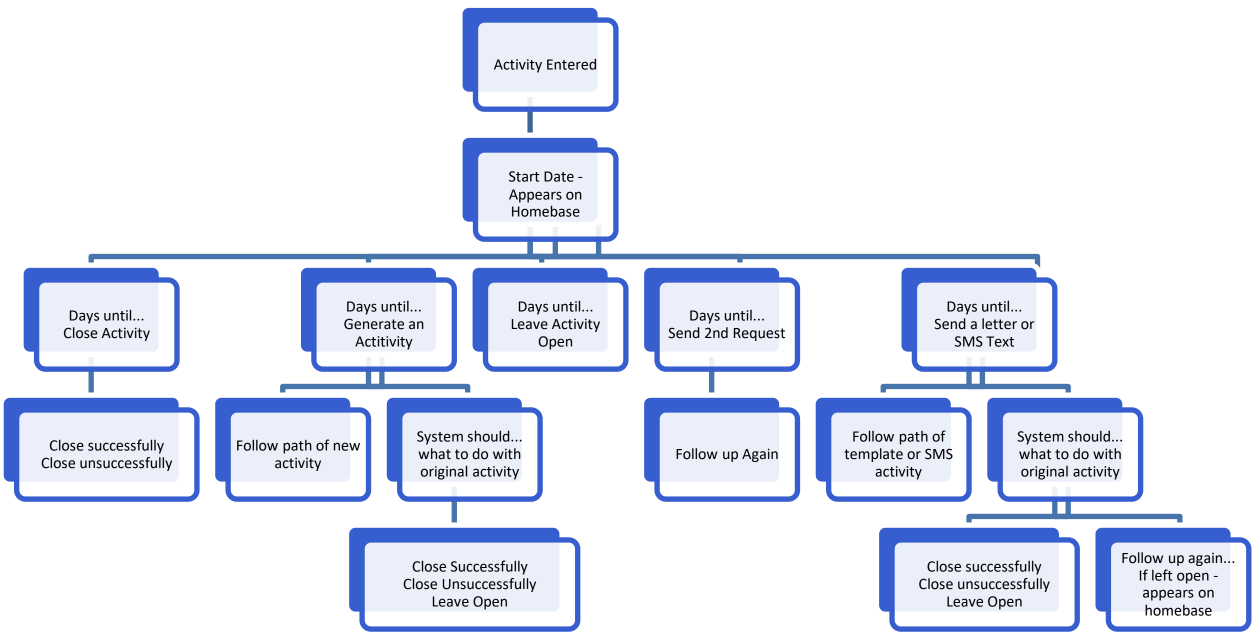
Activity Entered On: 8/1/2018
Follow Up/Start Date: 8/4/2018

Task Description	Start Date	Due Date	Owner
Attach prior dec pages	8/3/2018	8/5/2018	Producer
Attach Photos	8/5/2018		Producer
This is the next step	8/2/2018	8/8/2018	Loss Control Rep

Creating Automated Workflows

Making Applied Epic Work for You - Activity Code Configuration Flowchart

Further Action Choices

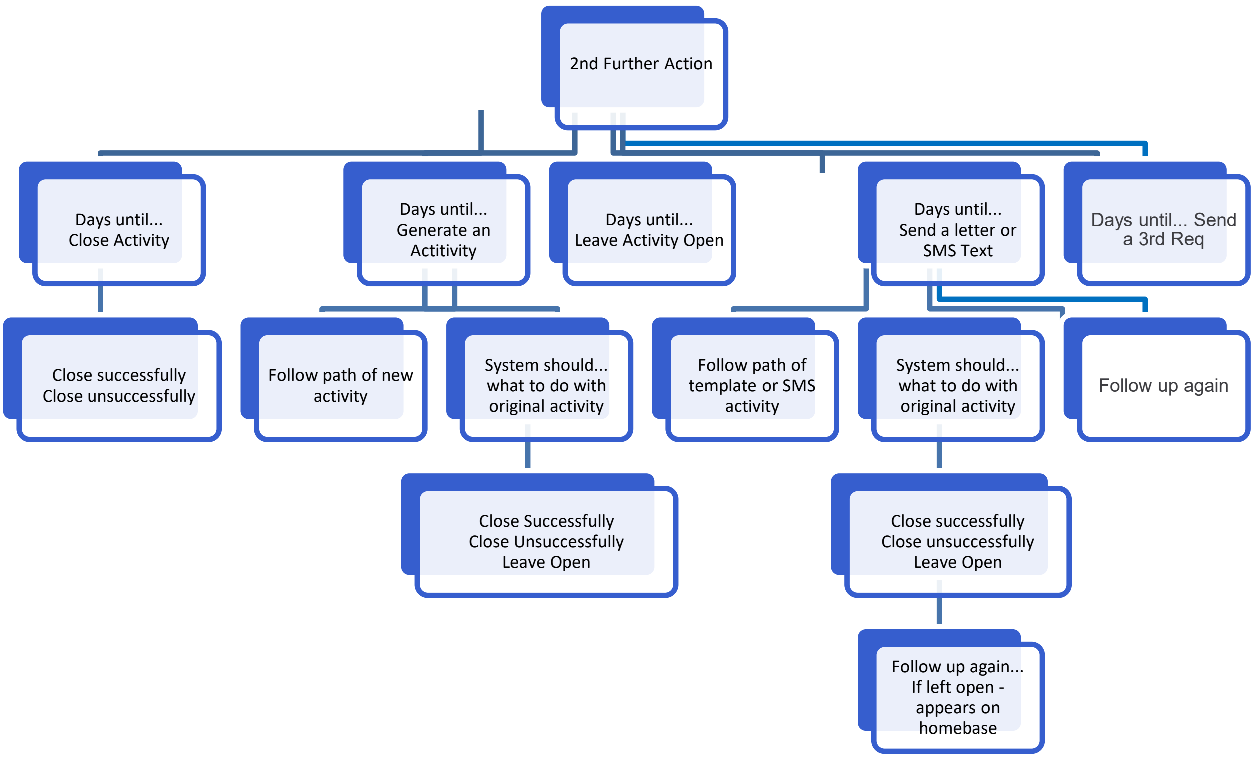


Automated Workflow Ideas:

- Welcome Letter to Client
- Claims Acknowledgment
- Endorsement Follow-up
- Prospecting Workflow (see Appendix)

2nd Further Action Choices

(Enabled only if *Send a 2nd Request*, *Send a Letter* or *Send an SMS Text* is chosen in Further Actions)

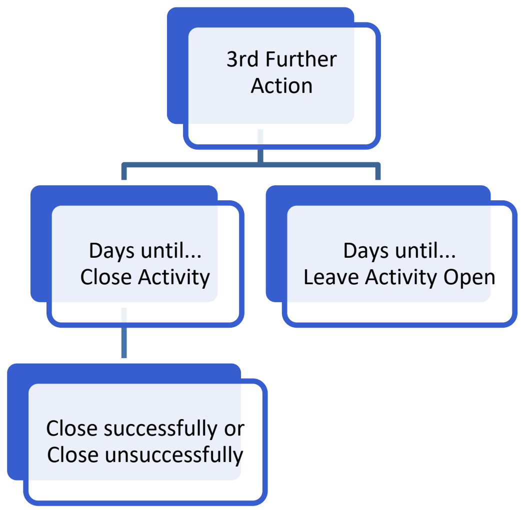


Note on Further Actions: Choosing *Send a 2nd Request* and *Send a 3rd Request* apply only to activities associated to certain Events that involve printing from Epic. The Further Action of sending a 2nd or 3rd request will re-send that initial item printed. Those Events are:

- Agent/Broker of Record Change
- Close Binder Transaction
- Fax Sent Successfully
- Print Cancellation
- Print Lost Policy Receipt
- Review Application
- Review Change Request
- Submit Application
- Submit Cancellation
- Submit Change Request
- Submit to Carriers

3rd Further Action Choices

(Enabled only if *Send a 2nd Request, Send a Letter or Send an SMS Text* is chosen in Further Actions)



Sample Automated Workflow

Create a Prospecting workflow

1. From Home Base, click **Configure > Activity** > **Codes**.
2. Select **ADOP** and then click **Edit**.
   Note: *If this code does not exist in your system, click* ***Add*** *to create it.*
3. In the Description, click your cursor at the end of the description "Add Opportunity".
4. Type **for** and then click the **Description Variable Lookup**.
5. Select **Account Name** and then click **Finish**. This adds the &AcctName& variable to the description.
6. Deselect the **Allow default description to be edited** checkbox.
7. On the Basic Settings tab, verify the following values:
   a. Owner Type = **User ID**
   b. Priority = **Normal**
   c. Default activity as = **Open**
   d. Start activity = **0** day(s) after entered
   e. When closing manually = **Default Successful**
8. On the Further Actions tab, enter the following values:
   a. Action to take = **Send a Letter**
   b. Template = **Click the Template Lookup**
      Note: If this template does not exist in your Applied Epic system, you can create it by accessing **Configure > Attachment > Templates > Templates – Prospect > Add.**
      i. In the Select Template window, select the following values:
      ii. Account type = **Prospect**
      iii. Template folder = **Marketing**
      iv. Template = **Thank you for the opportunity to quote**
      v. Click **Finish**.
   c. Days until system action = **1**
   d. Cover page = **Basic Fax Coverpage**
   e. System should = **Leave Activity Open** when further action is taken
   f. Follow up again = **2** days later
   g. From = **Branch**
   h. Subject = **Thank you for the opportunity to quote your business!**
   i. Message = **We appreciate the chance to work with you to meet your insurance needs. I will be in contact with you in the next few days to set up a meeting.**
9. On the 2nd & 3rd Further Actions tab, enter the following values:
   a. Action to take = **Generate an Activity**
   b. Activity code = **FEXD Exdate Follow Up**
   Note: *If this code does not exist in your Applied Epic System, click* ***Add*** *to create it.*
   c. Days until system action = **37**
   d. System should = **Leave Activity Open** when further action is taken
10. On the Tasks tab, click **Add** and then enter the following values:
    a. Task = **Schedule an appointment to conduct risk assessment**

b. Owner type = **Producer**
c. Start task = **3** days **After Activity Entered On** at **[blank time]**
d. Task due = **3** days **After Activity Entered On** at **[blank time]**
e. Click **Add**.
f. Task = **Complete a new prospect risk assessment**
g. Owner type = **Producer**
h. Start task = **5** days **Previous Task Due Date** at **[blank time]**
i. Task due = **10** days **Previous Task Due Date** at **[blank time]**
j. Click **Add**.
k. Task = **Complete applications based on assessment**
l. Owner type = **Client Service Rep**
m. Start task = **1** days **Previous Task Due Date** at **[blank time]**
n. Task due = **3** days **Previous Task Due Date** at **[blank time]**
o. Click **Add**.
p. Task = **Submit applications to carriers for quote**
q. Owner type = **Client Service Rep**
r. Start task = **1** days **After Previous Task Due Date** at **[blank time]**
s. Task due = **2** days **After Previous Task Due Date** at **[blank time]**
t. Click **Add**.
u. Task = **Confirm quotes received**
v. Owner type = **Client Service Rep**
w. Start task = **5** days **Previous Task Due Date** at **[blank time]**
x. Task due = **10** days **Previous Task Due Date** at **[blank time]**
y. Task = **Prepare proposals**
z. Owner type = **Client Service Tech**
aa. Start task = **1** days **Previous Task Due Date** at **[blank time]**
ab. Task due = **2** days **Previous Task Due Date** at **[blank time]**
ac. Task = **Schedule an appointment to review the proposals**
ad. Owner type = **Producer**
ae. Start task = **1** days **After Previous Task Start Due Date** at **[blank time]**
af. Task due = **3** days **After Previous Task Start Due Date** at **[blank time]**
ag. Click **Add**.
ah. Task = **Conduct the proposal review meeting**
ai. Owner type = **Producer**
aj. Start task = **5** days **After Previous Task Due Date** at **[blank time]**
ak. Task due = **10** days **After Previous Task Due Date** at **[blank time]**
al. Click **Finish**.
am. Click **Finish**.
an. Click **OK** to Further Actions changes will not affect existing activities.

11. From the Options Bar, select **On Demand** and then **Activity Timeline**.
12. Review the report to ensure the workflow steps and timeline meets your agency needs.
13. Click **Close**.